User's Guide

LSU Operating Budgeting Application (LOBA)

The LSU Operating Budgeting Application (LOBA) allows Cost Center Managers and Department Heads to review, export, submit, and approve changes to their respective annual operating budgets. The annual budgeting process will be completed in three separate iterations. The first two iterations will allow direct edits within the application and the third will be a view-only iteration for verification purposes.

To access LOBA log on to myLSU, click on Financial Services and select LSU Operating Budget Application.

ℹ️ Note: The information icon in LOBA can be clicked for descriptions of each section.

Financial Budget Tab

Financial Budget Summary – By Cost Center:

This section allows users to view a summary of the budget for each Cost Center for which they have the appropriate Workday access. Users will need either Cost Center Manager or Department Head access in Workday to utilize LOBA. Users can view their current Workday departmental role access by clicking on the "View Departmental Roles" button located at the top right side of this section.

The first column of the budget data displays the unit's July 1st beginning budget, for the current fiscal year, prior to any permanent adjustments have been processed. The second column displays the unit's permanent budget as of now in Workday, and the third column will display any changes made in LOBA by the unit for next year. Only the proposed amount column can be changed (see below).

- Double-click on a Cost Center row and scroll down to view budget line details for a particular Cost Center

Financial Budget Line Detail:

This section will load budget line detail for ALL Cost Centers for which the user has the appropriate Workday access (either Cost Center Manager or Department Head). However, once a cost center is double-clicked in the Financial Budget Summary section, only the budget line details for the Cost Center clicked will be shown. The filter can be removed by clicking "Clear Filter" if the user wishes to see all Cost Center budget line detail once again.

- **Quick Search** – allows user to view detail of only filtered groups of data, such as all detail for a particular Ledger Account. "Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.

- **Change Budget Line** –
    1. Single-click the budget line detail row to be changed
    2. Enter the "Proposed Budget" amount
    3. Click enter to save changes

The "Difference" column will automatically compute and display the difference between the current and proposed budget amounts for that particular budget line.

- **Budget Row Details -** to view additional line information or add a comment, double-click a budget line
  - o **Update Information -** once a budget line has been changed the "Update Information" including the user's name is shown on this screen.

  - o **Add a Comment** – details of budget changes can be noted by adding a comment
    1. Double-click budget detail line
    2. Click the box under "Add Comment" heading
    3. Click yellow plus sign "Save Comment" when complete

- **Add Row –** to add an additional ledger account or budget line, click the "Add Row" button on the right side at the top of the Financial Budget Line Detail section.
  1. **Ledger Acct**: click on the three dots to pull up selection menu
     - Type in the ledger account or description and click the circular arrow
     - Double click the appropriate ledger account to populate field
  2. **Driving Worktag**: click on the three dots to pull up selection menu
     - Code: click on arrow for drop down menu and select Driving Worktag type
     - Attribute: click on three dots and enter Driving Worktag and click on the circular arrow
     - Double click the appropriate Driving Worktag to populate field
  3. **Revenue/Spend Category**: not required
  4. **Amount:** enter amount and click Save

Position Budget Tab

Position Summary – By Cost Center

This section allows unit Cost Center Managers and Department Heads to review their respective position budgets. The Position Budget Tab is for viewing position information only. **Any corrections to Position Budget must be processed in Workday. For LSU A&M units, these corrections will be processed by Budget & Planning. Please send requests to John Duplantis at jdupl12@lsu.edu. All requests must include:**

> **Name (if filled)**
> **Position number**
> **Program number/driving worktag and dollar amount for each split**
> **Source of funds if needed**

- Double-click on a Cost Center row and scroll down to view the position budget line details for a particular Cost Center

Position Budget Summary – By Position:

This section will provide all positions that are budgeted in the Cost Center chosen in the Position Summary – By Cost Center section.

> **Initial Budget** – the original/beginning budget prior to any permanent adjustments
> **Total Budget** – the current budget for a particular position including all Cost Center splits
> **Cost Center Budget** – the position budget portion related to the specific cost center chosen from the Position Summary – By Cost Center section

- **Quick Search** – allows user to view detail of only filtered groups of data.   "Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.
- Double click on a position budget row and scroll down to view Position Budget Detail.

Position Budget Detail:

This section will provide all lines for every position included in the position budget of the cost center chosen in the Position Summary – By Cost Center section. If a specific position is chosen in the Position Budget Summary – By Position section above, all budget detail lines for that position will populate. Each detail row will contain all related worktags for the budget line as well as the Initial Budget, Total Budget, and Cost Center Budget for the position.

<u>**Budget Totals Tab:**</u>

This tab allows the Cost Center Manager or Department Head to review the revenue and expenditure budget totals by their organization.

Rev/Exp Budget Totals – By Organization:
1. Organization Type: click the arrow to pull up the drop down menu
2. Select the driving worktag (Note: for auxiliary units wishing to ensure their budget is balanced, select Fund)
3. Organization: click the three dots, enter the description and click the circular arrow

The Revenue and Expenditure totals will show separately with the net balance calculated automatically.

<u>**Financial Worktag Search**</u>

The Financial Worktag Search will load budget line detail for any Worktag selected.

- **Select Worktag** – select the appropriate Worktag from the drop-down list.

- **First Quick Search** – In the first quick search section, the user can search by description or ID. Double-click the desired row, only the budget line details for the Worktag clicked will be shown.

- **Second Quick Search** – allows users to view detail of only filtered groups of data, such as all detail for a particular Ledger Account.

- "Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.

- **Change Budget Line** –

    1. Single-click the budget line detail row to be changed
    2. Enter the "Proposed Budget" amount
    3. Click enter to save changes
    4. Add a comment by Double-Clicking (instructions below)

The "Difference" column will automatically compute and display the difference between the current and proposed budget amounts for that particular budget line. The "Original" column will remain the same throughout the budgeting process.

- **Add a Comment** – details of budget changes can be noted by adding a comment

    1. Double-click budget detail line
    2. Click the box under "Add Comment" heading
    3. Click yellow plus sign "Save Comment" when complete

Position Worktag Search

The Position Worktag Search allows the Cost Center Managers and Department Head to review their respective position budgets. This tab and the Position Budget Tab are for viewing position information only. **Any corrections to the Position Budget must be processed in Workday. For LSU A&M units, these corrections will be prepared by Budget & Planning. Please send requests to John Duplantis at jdupl12@lsu.edu. All requests must include:**

> **Name**
> **Position number**
> **Program number/driving worktag and dollar amount for each split**
> **Source of funds if needed**

- **Select Worktag (Position)** – select the appropriate Worktag from the drop-down list.

- **First Quick Search** – In the first quick search section, the user can search by description or ID. Double-click the desired row, only the budget line details for the Worktag clicked will be shown.

- **Second Quick Search** – allows users to view detail of only filtered groups of data, such as all detail for a particular Ledger Account.

"Quick Search" can be used to sort or can be used as a filter by entering text and clicking the circular arrow.